

<b>Client Name:</b>	<b>Client Code:</b>	<b>Period:</b> 30/06/2
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**New Client?**     Yes     No    If yes, previous year tax return required.

<b>Mobile No:</b> <b>E-mail Address:</b> <b>Residential Address:</b>	<b>Work No:</b> <b>Occupation:</b> <b>Postal Address:</b>
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**Copies of the following reports:**

PAYGI                       ATO Interest                       Pre-filling Report

<b>INCOME</b>	<input type="checkbox"/> PAYG Payment Summary Forms <input type="checkbox"/> Termination Payments <input type="checkbox"/> Interest Received <input type="checkbox"/> Dividends Received <input type="checkbox"/> Trust or Partnership Income																
<b>DEDUCTIONS</b>	<input type="checkbox"/> Loan statements and/or total interest incurred in earning interest income <input type="checkbox"/> Receipts of any work related deductions (m/v, work uniform, protective clothing, travel) <input type="checkbox"/> Depreciable assets bought during the year (e.g. laptops) <input type="checkbox"/> Professional journals/magazines <input type="checkbox"/> Professional memberships <input type="checkbox"/> Receipts for continuing professional development courses and seminars <input type="checkbox"/> Receipts for self education expenses <input type="checkbox"/> Vehicle logbook for motor vehicle expenses (if using logbook method) <input type="checkbox"/> Donations of \$2 and over to registered charities <input type="checkbox"/> Managing tax affairs (e.g. tax agent's fees) <input type="checkbox"/> Expenses incurred in earning investment income <input type="checkbox"/> Income protection insurance premiums <input type="checkbox"/> Asset disposals (acquired after 19 September 1985)																
<b>REBATES</b>	<input type="checkbox"/> Private health insurance annual tax statement <input type="checkbox"/> Tax payers spouse and details of dependents <input type="checkbox"/> Contribution to their spouses superannuation fund <input type="checkbox"/> Contribution to a superannuation fund for themselves <input type="checkbox"/> Out of pocket medical expenses exceed \$1,500 <input type="checkbox"/> Eligible education expenses (computers, textbooks etc) Must be eligible for FTB Part A <input type="checkbox"/> Primary school <input type="checkbox"/> Secondary school    Childs name: _____																
<b>RENTAL PROPERTIES</b>	<input type="checkbox"/> Annual rental property statement from agent <input type="checkbox"/> Date property purchased and purchase price <input type="checkbox"/> Depreciable assets bought or disposed during the year <input type="checkbox"/> Is the property held by more than one individual (details of owners and their legal ownership percentage) <input type="checkbox"/> Was the property disposed of during the income year (dates and costs associated with the acquisition and disposal) of the property <input type="checkbox"/> Period that the property was rented/available for rent during the income year <table border="1" style="width: 100%; background-color: #cccccc;"> <tr> <th colspan="2" style="text-align: center;">Expenses</th> </tr> <tr> <td><input type="checkbox"/> Interest on loans</td> <td><input type="checkbox"/> Advertising fees</td> </tr> <tr> <td><input type="checkbox"/> Water charges</td> <td><input type="checkbox"/> Bank fees</td> </tr> <tr> <td><input type="checkbox"/> Agent fees</td> <td><input type="checkbox"/> Borrowing expenses</td> </tr> <tr> <td><input type="checkbox"/> Body corporate fees</td> <td><input type="checkbox"/> Interest on loans</td> </tr> <tr> <td><input type="checkbox"/> Council rates</td> <td><input type="checkbox"/> Insurance premiums paid</td> </tr> <tr> <td><input type="checkbox"/> Land tax details</td> <td><input type="checkbox"/> Cleaning and general maintenance expenses</td> </tr> <tr> <td><input type="checkbox"/> Gardening/Lawn mowing fees</td> <td></td> </tr> </table>	Expenses		<input type="checkbox"/> Interest on loans	<input type="checkbox"/> Advertising fees	<input type="checkbox"/> Water charges	<input type="checkbox"/> Bank fees	<input type="checkbox"/> Agent fees	<input type="checkbox"/> Borrowing expenses	<input type="checkbox"/> Body corporate fees	<input type="checkbox"/> Interest on loans	<input type="checkbox"/> Council rates	<input type="checkbox"/> Insurance premiums paid	<input type="checkbox"/> Land tax details	<input type="checkbox"/> Cleaning and general maintenance expenses	<input type="checkbox"/> Gardening/Lawn mowing fees	
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